SC LENDS
ILL User Manual

Disclaimer 1
This document is a modified version of the ILL section of the Michigan Evergreen User Manual. The screen prints are as they appear in that document. The procedures and field names have been updated slightly to reflect the SC LENDS ILL template and version of Evergreen

Disclaimer 2
This document may not reflect the ILL procedures within your library system. You are free to modify it as needed to serve your staff. Please, however, continue to give credit to Michigan Evergreen for creating the original document.

Recording Interlibrary Loan Transactions

When your library borrows an item from a library outside of SC LENDS, you will want to record this interlibrary loan (ILL) transaction in the system. As of now, there is no specific ILL module in Evergreen. You can either record the ILL as a pre-cataloged item, which takes just seconds but does not allow for tracking. If you library wants to track ILLs and generate reports, you can use the method described in this document. This suggested method will allow you to track ILLs and generate reports. It will also allow patrons to renew their ILLs online (if your local policy allows ILL renewals).

The following Exercise is broken into three segments:

1. Initial ILL Staff workflow to process incoming ILL materials from other libraries.
2. Circ Staff workflow to check out, check in, and return materials to ILL Department.
3. Final ILL Staff workflow to process ILLs for return to lending libraries.

Initial ILL Staff Workflow

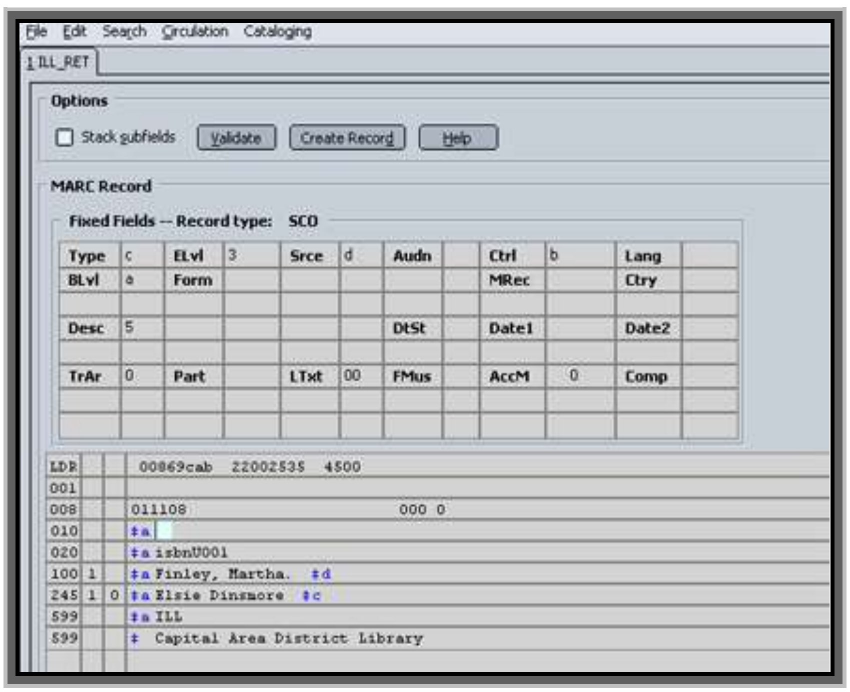
First, your library's ILL staff will create a brief bibliographic record for the item.

1. Log into Evergreen using an ILL user log-in. (An ILL user is assigned to the ILL Staff SCLENDS profile.)

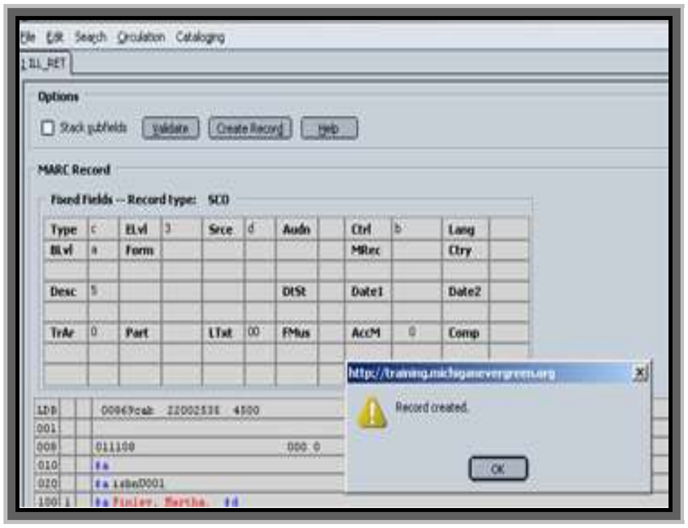
2. Click on **Cataloging** on the menu bar and select **Create New MARC Record**.

3. Select the MARC template for BCL-ILL and click **Load**.

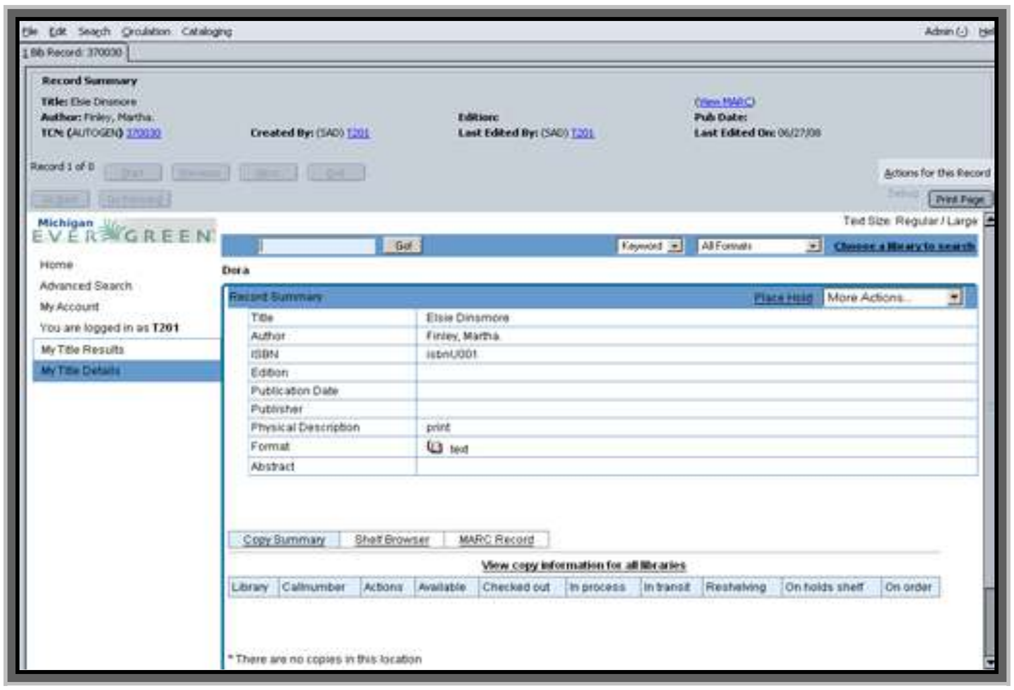
4. Enter as many of the fields as you can or as required by your library system. One note, the first 599 field must remain "ILL Record." Use the second 599 field to record the lending library if needed.



5. After entering the above information, click **Create Record** and then Click **OK**.



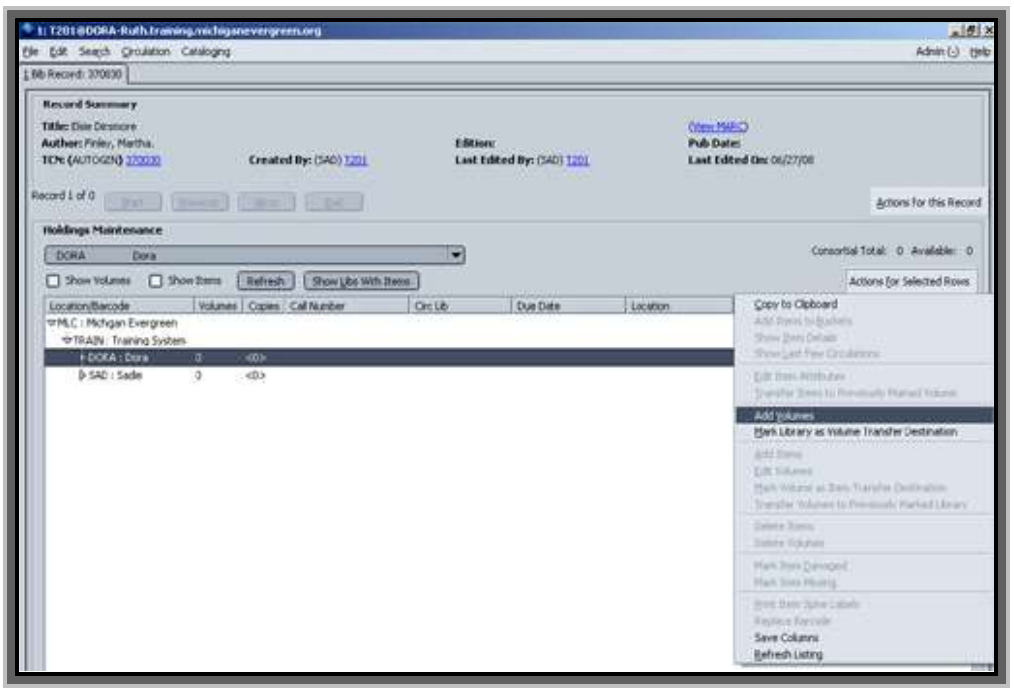
6. An OPAC view of the new record opens.



Now that you have created the bibliographic record, add an item.

1. In the right-hand corner of the screen, click the **Actions for this Record** drop-down field. Click **Holdings Maintenance**.

2. Select your library from the list and click the **Actions for Selected Rows** drop-down field. Click **Add Volumes**.



3. The Volume and Copy Editor window opens. Enter the number “1” in the # of volumes field and press Tab. (This number will always be “1” unless you are adding a multi-volume set.)

4. Type “ILL” in the Call Number field and press Tab.

5. Enter “1” in the # of Copies field and press Tab.

6. Click in the adjoining box, and scan in the lending library’s barcode.

7. When all four boxes are filled in (# of volumes, Call Numbers, # of Copies, and Barcode), click the **Edit then Create** push button.

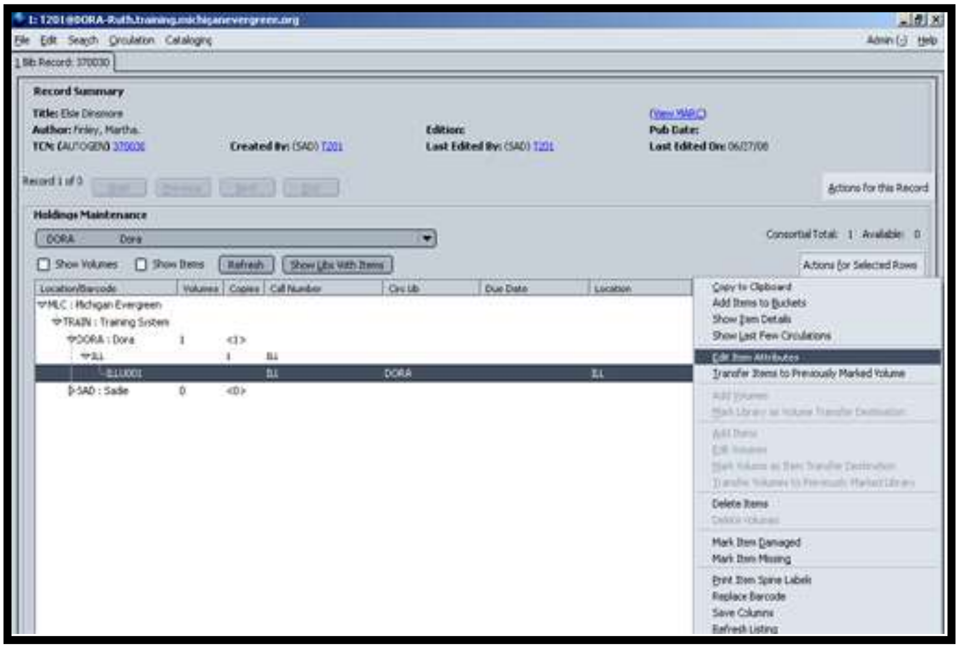
8. The Copies window opens. If you have an ILL copies template (which is different from the ILL MARC template you used earlier), click on the Templates drop-down box, select ILL, and click Apply.

   Note: Copy templates let you automatically apply copy settings such as Shelving Location and OPAC Visible. Catalogers use them often, so if you're interested in creating one for ILLs, talk to your cataloger or to your local system administrator.

9. Verify the following settings on the Copies screen and update as needed. Make sure to click **Apply** each time you change a setting. The field will appear green if it's been applied.
    - Location/Collection to "ILL" (or whatever your library uses for its ILL location)
    - Circulate? to "Yes"
    - Holdable to "Yes"
    - Alert Message to "ILL – return to ILL Dept after check in"
    - OPAC Visible to "No"

10. Click **Create Copies** in the lower right hand corner. A message window opens that lets you know the item has been created. Click **OK**.

11. You now need to edit the attributes of the item that you just created. Highlight the item row. Click the **Actions for Selected Rows** menu and click **Edit Item Attributes**.



12. Change the status from “In process” to “Available” and click **Apply**.

13. Click the **Copy Notes** push button in the lower right corner and click **Add New Note** when the Notes screen opens. Now add information to the record to indicate the patron who ordered this item on ILL. This is also a good place to add the lending library’s call number for the ILL item (in case it gets shelved at your library by mistake).

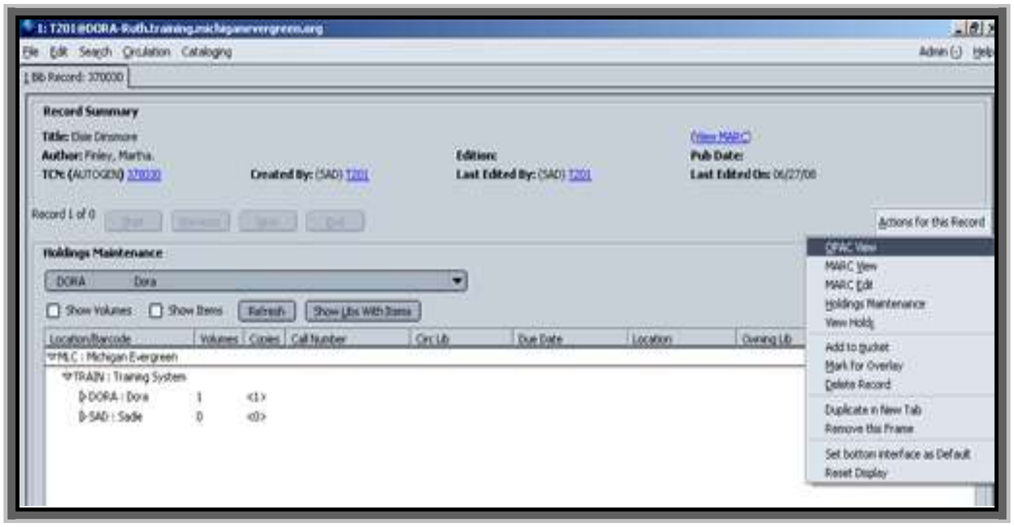
14. You will see a box next to Public? – DO NOT CHECK THIS BOX! The ILL patron's information needs to be private. Type "ILL Info" in the Title field (the word Title here means "title of the note"). In the Note field, add the patron's barcode number, the lending library's call number for the ILL item, and any other information you need for tracking. Click **Add Note** and then click **OK**.

15. A yellow window opens with the contents of the note. Click the **Close Window** push button. Then click **Modify Copies** and **OK**.

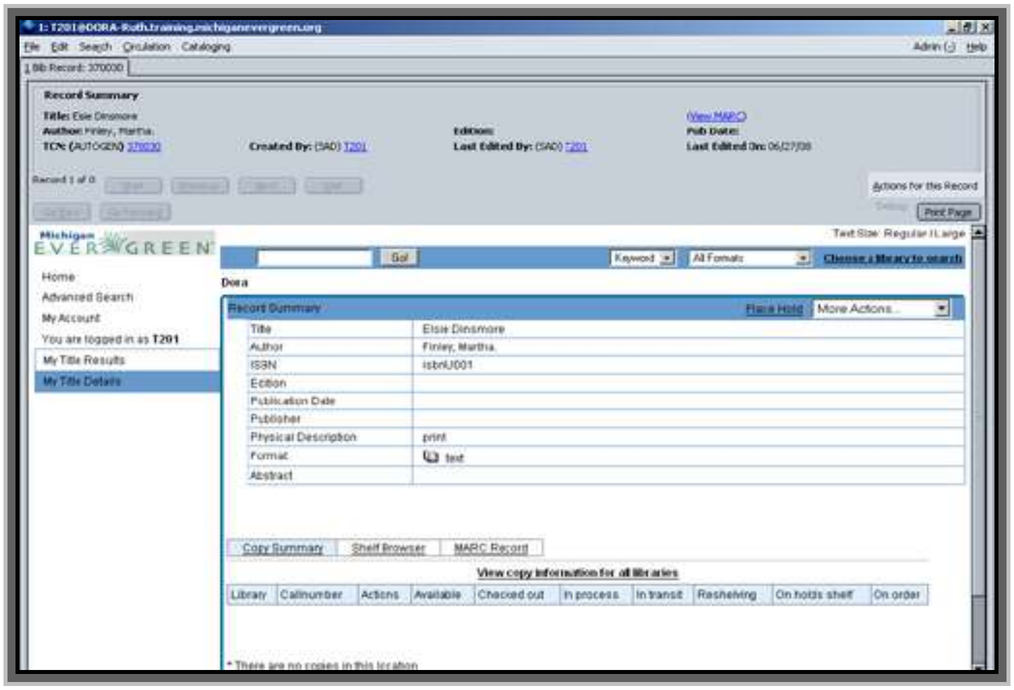
16. The record screen reopens.

Now create and capture a hold for the ILL patron for this item.

1. Click **Actions for this Record** and click **OPAC View**.



2. Click **Place Hold**.

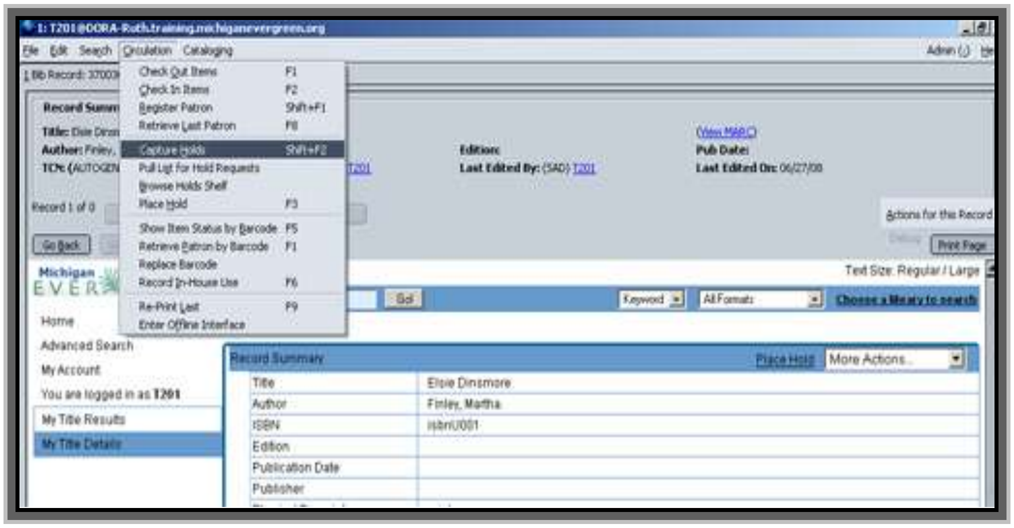


3. Enter the patron's barcode number and click **Submit**.

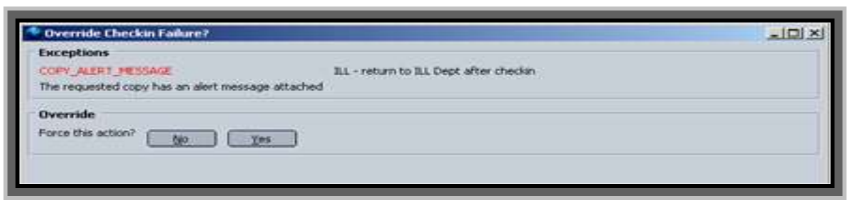
4. The Create/Edit a Hold page opens. Click **Place Hold**. (If the ILL Patron requests a special pickup location or provides a different phone or email for notification, edit this screen before clicking Place Hold.)

5. Click **OK** when the screen indicates that the Hold is successfully placed. If you receive an error message that there is no copy available for a hold, you will need to go back to check your settings. This can happen if you forgot to add a barcode or if the item is set at “no holds” by mistake.

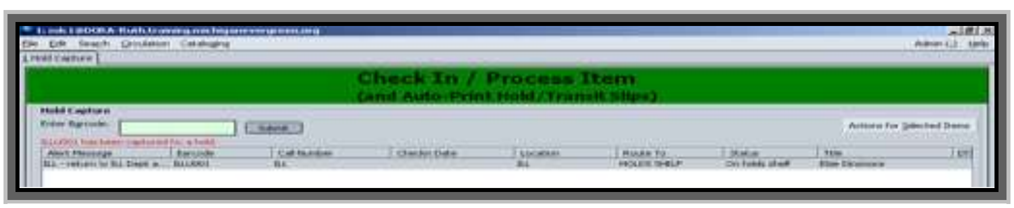
6. You now need to capture the hold for the ILL Patron. Click **Circulation** on the menu bar and click **Capture Holds**.



7. Scan in the barcode of the item. It will note that there is an Alert message. Click **Yes** to override.



8. You will briefly see a holds slip for printing appear in the upper left of the screen. In your library, this slip will print out so that you can place the holds slip with the item prior to putting the item on the holds shelf. Notice that the screen indicates that the item has been captured for a hold.

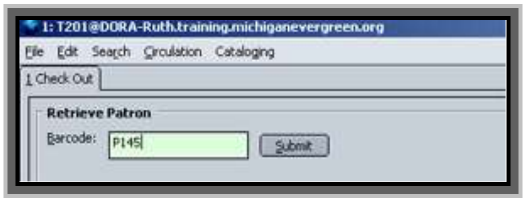


9. The ILL item is now ready for ILL Staff to place on the holds shelf for the patron to pick up.

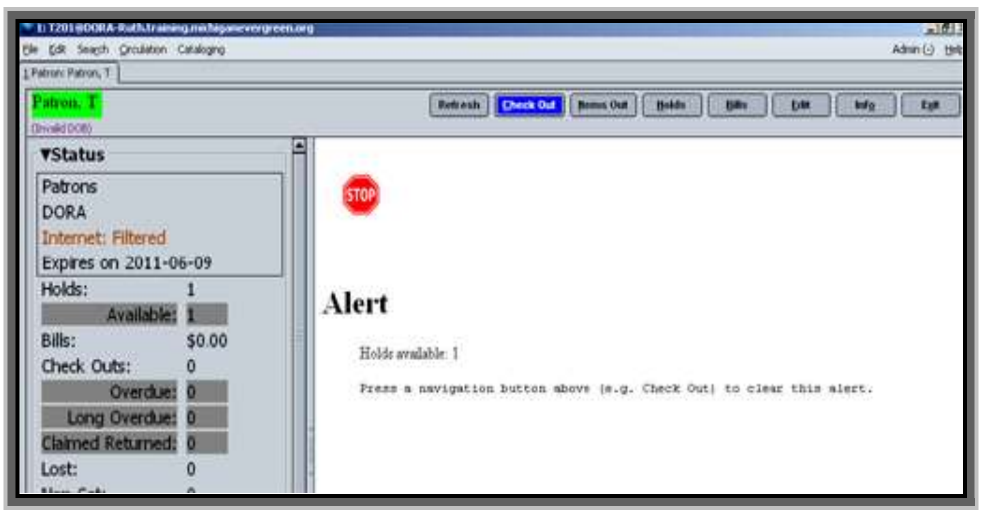
Circ Staff workflow

Once the ILL has been processed and placed on the holds shelf, the Circulation Staff can check out the item to the patron like any other hold item. When the item is checked back in, however, Circulation Staff will need to be sure to route it back to the ILL Dept for return processing.

1. To check out the item, press the F1 function key. Scan in the patron barcode and click **Submit**.

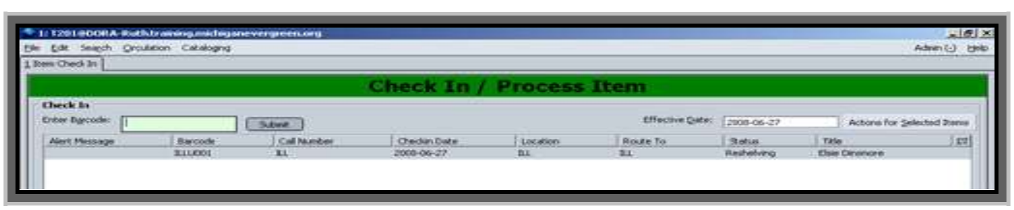


2. The Patron screen will shows an Alert that an item is on hold.



3. Click **Checkout**, scan in the barcode, and click **Submit**. Click **Yes** to override the Alert screen.

4. When the patron returns the ILL item, check it in as usual. Press F2, scan in the barcode, and click **Submit**.



5. Route the item to the ILL Department as the Alert Message indicates.

Final ILL Staff workflow

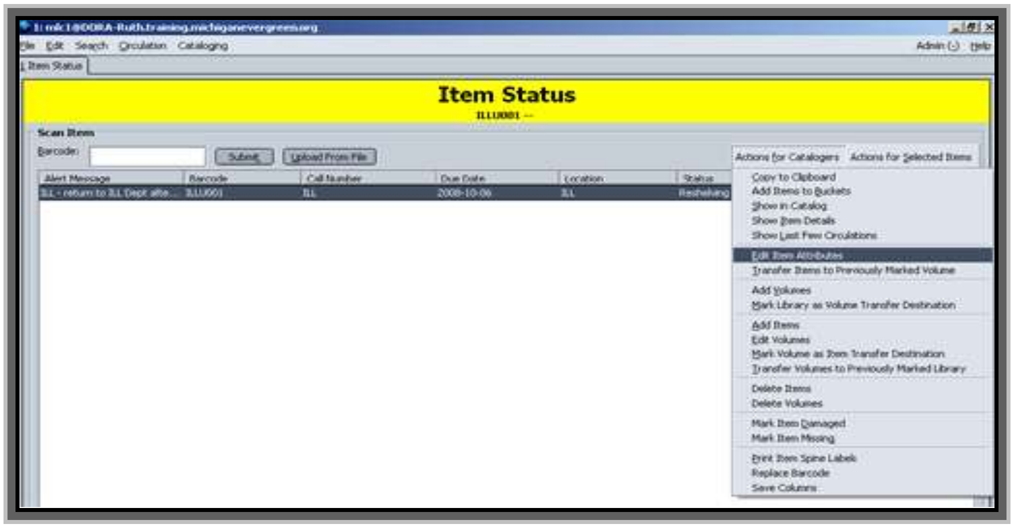
When the patron returns the ILL item and Circulation has checked in the item and returned it to ILL, the ILL Staff will need to delete the ILL Info Note that contains the patron's barcode and call number. The ILL Staff will also need to change the item attributes to indicate "no holds" and "non-circulating."

Note that the ILL Staff SCLENDS profile does not have permission to delete a copy or a record. If your workflow requires that ILL staff delete copies, ask your local system administrator to grant your ILL log-in account permission to delete copies.

When an item is turned back in to ILL:

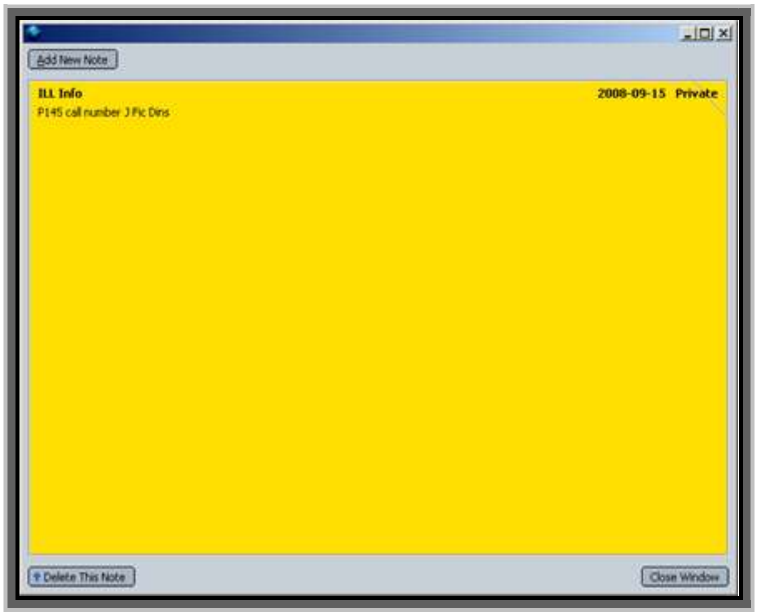
1. Press the F5 function key to open the Item Status by Barcode page. Scan in the item barcode and click **Submit**.

2. Highlight the item and click on the **Actions for Catalogers** drop-down list. Click **Edit Item Attributes**.



3. Change Circulate? to “No” and Holdable? to “No.”

4. Click **Copy Notes** and click **Delete this Note** to remove Patron barcode information from the record.



5. Respond **Yes** to deleting the Note, close out of the Notes screen, and click **Modify Copies** on the Attributes screen. Make sure to click Modify Copies before you click Close or you will lose your edits.

6. Depending on your library’s policies, you might also wish to delete the Item and Volume. This is done on the Item Status page (use F5 to access). Delete the Item first and then the Volume. Again, talk to your local system administrator to get the required permissions if your library’s workflow calls for them.